Link to article: https://discover.claromentis.com/knowledgebase/articles/375

Mortgage Application

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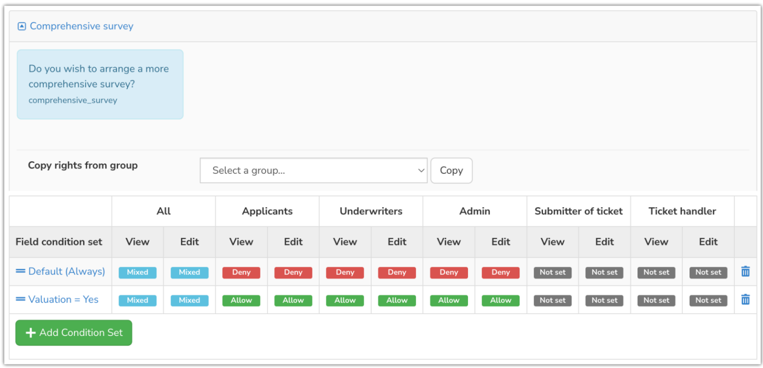
Overview

Thoroughly documenting a customer's details is critical with processes as complex as mortgage applications. This form has over 230 fields, taking the applicant through a series of questions about their financial circumstances. Data is categorised in an ordered fashion through sections of the form; such as "Address history" and "Employment and Income details".

Additional features

Show/hide Field Permissions: Many of the form's fields will not be relevant for the applicant except under certain circumstances. For this reason, many of the fields remain hidden until certain conditions are met.

In the example seen here, if the applicant has selected 'yes' to a valuation, then the field *'Do you wish to arrange a more comprehensive survey'* is then allowed to appear.



Comprehensive survey

Do you wish to arrange a more comprehensive survey?
comprehensive_survey

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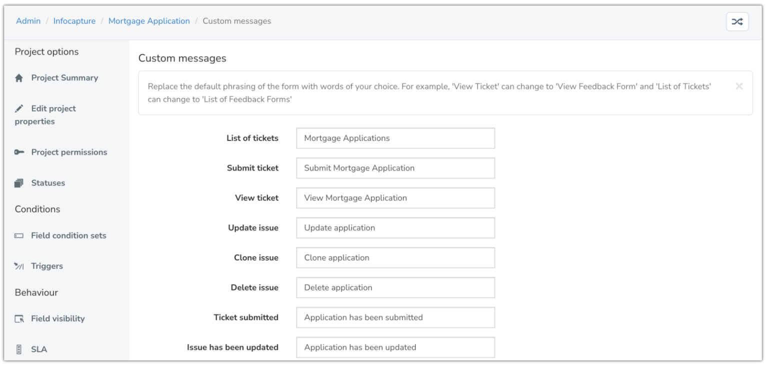
	All		Applicants		Underwriters		Admin		Submitter of ticket		Ticket handler	
Field condition set	View	Edit	View	Edit	View	Edit	View	Edit	View	Edit	View	Edit
Default (Always)	Mixed	Mixed	Deny	Deny	Deny	Deny	Deny	Deny	Not set	Not set	Not set	Not set
Valuation = Yes	Mixed	Mixed	Allow	Allow	Allow	Allow	Allow	Allow	Not set	Not set	Not set	Not set

+ Add Condition Set

Head to the *Field Visibility* tab in the form once imported onto your site to see the full list of rules in place.

Custom messages: The use of phrases like 'ticket' might not suit as well as 'application', so we have used the *Custom Messages* area to change the wording whenever it appears.



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